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AUTHOR Glaubke, Christina Romano; Miller, Patti
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ABSTRACT

The Federal Communications Commission is currently considering modifying or eliminating existing media ownership rules. Children's advocates are concerned that any changes to these rules could negatively affect the already limited amount and types of programming available for children. Children Now conducted the first study to examine the availability and diversity of children programming in an increasingly consolidated media marketplace. Los Angeles was selected as a case study for this research because it is the second largest media market in the country, and two duopolies now exist among its television stations. The study compared the children's programming schedules from 1998, when the market's seven major commercial broadcast television stations were owned by seven different companies, to 2003, after consolidation reduced the number to five. The findings suggest that changes to the current ownership policies will have a serious impact on the availability and diversity of children's programming. Overall, the research shows there are fewer children's series, fewer broadcast hours, and an increase in repurposed (aired on more than one channel) programs in Los Angeles today compared to 5 years ago. (Author)

Big Media, Little Kids: Media Consolidation & Children's Television Programming

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BIG MEDIA, LITTLE KIDS:
MEDIA CONSOLIDATION AND CHILDREN'S TELEVISION PROGRAMMING

KEY FINDINGS

The Federal Communications Commission is currently considering modifying or eliminating existing media ownership rules. Children's advocates are concerned that any changes to these rules could negatively affect the already limited amount and types of programming available for children. In order to inform the Commission's upcoming rulemaking, Children Now conducted the first study ever to examine the availability and diversity of children's programming in an increasingly consolidated media marketplace. Children Now selected Los Angeles as a case study for this research because it is the second largest media market in the country and two duopolies now exist among its television stations. The study compares the children's programming schedules from 1998, when the market's seven major commercial broadcast television stations were owned by seven different companies, to 2003, after consolidation reduced the number to five. The findings suggest that changes to current ownership policies will have a serious impact on the availability and diversity of children's programming.

Number of Children's Series

- The number of children's series broadcast in Los Angeles has decreased by nearly half since 1998.
- Most of the decreases in the number of children's series in Los Angeles occurred on three of the four stations that are part of media duopolies.

Hours of Programming

- From 1998 to 2003, the number of hours each week devoted to children's programming in Los Angeles decreased by more than 50%.
- The largest decreases in programming hours were on stations that are part of media duopolies.

Hours of Availability of Children's Programs

- Since 1998, the number of hours each week that children's programs can be found on the air has decreased by almost one-third.
- The number of stations broadcasting children's programming at any given hour has decreased as well, thereby reducing the diversity and availability of age-appropriate program choices for children.

Repurposing of Children's Programming

- In 2003, children's programs were almost four times more likely to be repurposed, or aired on more than one channel or network, than in 1998.
- Most repurposing occurred between outlets that were owned by the same media companies.

Overall, this research shows there are fewer children's series, fewer broadcast hours and an increase in repurposed programs in Los Angeles today compared to five years ago. The results of this study leave little doubt that media consolidation diminishes the availability and diversity of programs for children. The FCC needs to consider the impact of its proposed rule changes on the youngest consumers of television as it weighs the consequences of regulatory reform in its broadcast media ownership policies.

BIG MEDIA, LITTLE KIDS: **MEDIA CONSOLIDATION AND CHILDREN'S TELEVISION PROGRAMMING**

Introduction

Television is an extraordinarily powerful and ubiquitous medium for the nation's children. On average, children watch almost three hours of television per day, and more than half of all kids ages two to 18 (53%) have a television in their bedroom.¹ Virtually all children watch television before their first exposure to formal education. In addition, by the time most American children finish the first grade, they will have spent the equivalent of three school years in front of the TV.²

According to the Communications Act of 1934, broadcasters are required to act in the "public interest, convenience and necessity" in return for free use of the airwaves. Both the Federal Communications Commission and Congress have affirmed that children constitute a unique audience that merits special consideration and protection. Yet the history of children's television demonstrates that, in the absence of regulation, commercial broadcasters do not voluntarily serve the public interest needs of children.

Currently, the FCC is considering modifying or eliminating existing media ownership rules. Children's advocates are concerned that any changes to these rules could negatively affect the already limited amount and types of programming available for children. Before making changes, the Commission has an obligation to evaluate the consequences its decisions will have on the child audience. It is essential the Commission ensure, first and foremost, that children's interests are protected as it weighs the effects of regulatory reform in its broadcast media ownership policies.

In order to inform the Commission's upcoming rulemaking, Children Now conducted a study analyzing the impact of media consolidation on children's programming over the past five years. This is the first study ever to examine the availability and diversity of children's programs in an increasingly consolidated media marketplace.

Children Now selected Los Angeles as a case study for this research because it is the second largest media market in the country and offers a large sample of stations and programs to study. In addition, the FCC allowed News Corp. (in 2001) and Viacom (in 2002) to purchase second stations in Los Angeles, thereby creating two duopolies in this market.³ In order to investigate changes in children's programming that may have resulted from this consolidation, Children Now compared the children's programming schedules from 1998, when the seven major commercial broadcast television stations were owned by seven different companies, to 2003, when consolidation reduced the number of owners to five.⁴

¹ Donald F. Roberts, et al., *Kids & Media @ the New Millennium* (Los Altos, CA: Kaiser Family Foundation, 1999), <<http://www.kff.org/content/1999/1535/>>.

² *Id.*

³ A duopoly is created when one company owns two stations in the same market. There are actually three duopolies in Los Angeles, as General Electric owns both KNBC and the local Telemundo station. Since Telemundo programs for a different audience than the stations in the study, and since it is not one of the primary commercial broadcast stations, it was not included in the study.

⁴ Although there are five station owners in Los Angeles in 2003, there are actually only four companies that provide programming to the market, since the UPN network is owned by Viacom and the UPN affiliate in Los Angeles, KCOP, gets much of its programming from the UPN network.

Table 1. Los Angeles Stations' Network Affiliations and Owners

Station/ Channel	1998 Owner	2003 Owner	Network Affiliation (2003)
KCBS-2	Westinghouse	Viacom	CBS
KNBC-4	General Electric	General Electric	NBC
KTLA-5	Tribune Company	Tribune Company	WB
KABC-7	Walt Disney Company	Walt Disney Company	ABC
KCAL-9	Young Broadcasting	Viacom	Independent
KTTV-11	News Corporation	News Corporation	FOX
KCOP-13	Chris Craft Industries	News Corporation	UPN

I. Number of Children's Series

A primary concern regarding media consolidation is that it will decrease the number of television series that are broadcast for children. A close look at the series offerings from the seven commercial broadcast stations in Los Angeles reveals there is valid reason for this concern.

The number of children's series broadcast in Los Angeles has decreased by nearly half since 1998. Over the past five years, the total number of children's series that aired each week on commercial broadcast television in Los Angeles has declined by 47%. In 1998, stations in Los Angeles offered children a total of 88 different program titles per week; today they provide young viewers with 47 different shows per week, equivalent to less than one show per station per day.

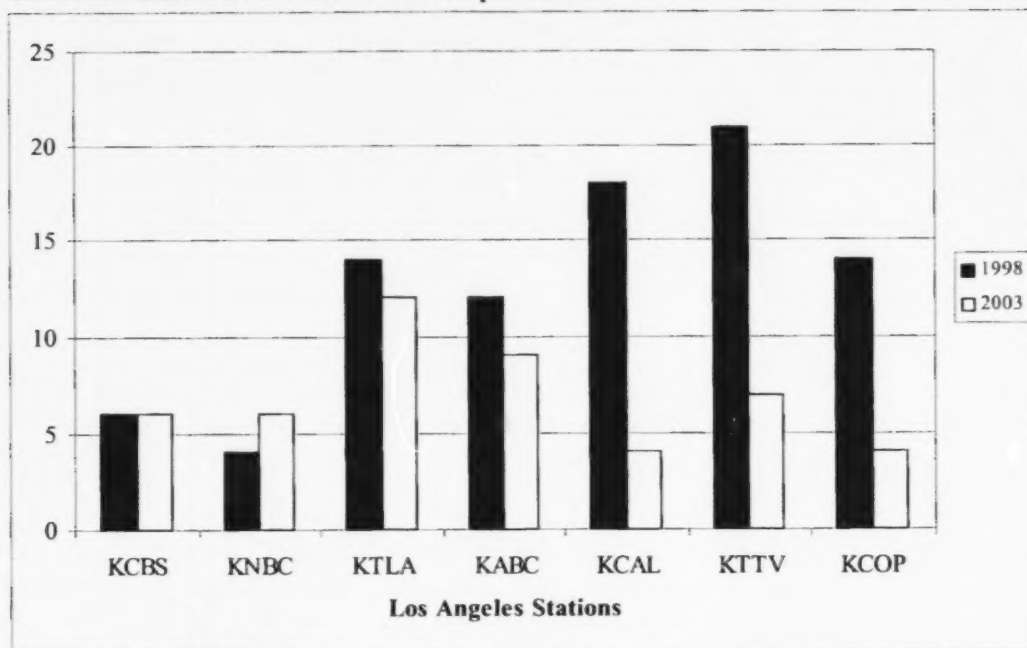
Most of the decreases in the number of children's series in Los Angeles were from three of the four stations that are part of duopolies. KCAL, KCOP and KTTV were the only stations with statistically significant reductions in children's programming.

- KCAL aired 18 series per week in 1998 compared to 4 in 2003, a decrease of 78%.
- KCOP broadcast 14 series per week in 1998 compared to 4 in 2003, a decrease of 71%.
- KTTV showed 21 series per week in 1998 compared to 7 in 2003, a decrease of 67%.
- KCBS, the remaining duopoly station, maintained a program lineup of six series per week in both 1998 and 2003.

Changes in the number of children's series broadcast on the three non-duopoly stations were not statistically significant.

- KTLA aired 14 series per week in 1998 compared to 12 series in 2003, a decrease of 14%.
- KABC broadcast 12 series each week in 1998 compared to 9 in 2003, a decrease of 25%.
- KNBC broadcast 4 series each week in 1998 compared to 6 in 2003, an increase of 50%.

Chart 1. Number of Children's Series per Week⁵



II. Hours of Programming

Since children's shows often are broadcast several times each week, it is important to examine not only the number of series offered to young viewers but also the total hours of children's programming broadcast per week. Similar to the findings on the number of children's series, the number of hours per week of children's programming in Los Angeles has decreased significantly since 1998.

From 1998 to 2003, the number of hours each week devoted to children's programming decreased by more than 50%. In 1998, commercial television broadcasters in Los Angeles offered 97.5 hours of children's programming per week. In 2003, that number had declined by more than half, with 48 hours each week devoted to children's programs.

The largest decreases in programming hours came from stations that are part of media duopolies. The two stations with statistically significant decreases in the weekly hours of children's programs were both part of duopolies, KCAL and KTTV.

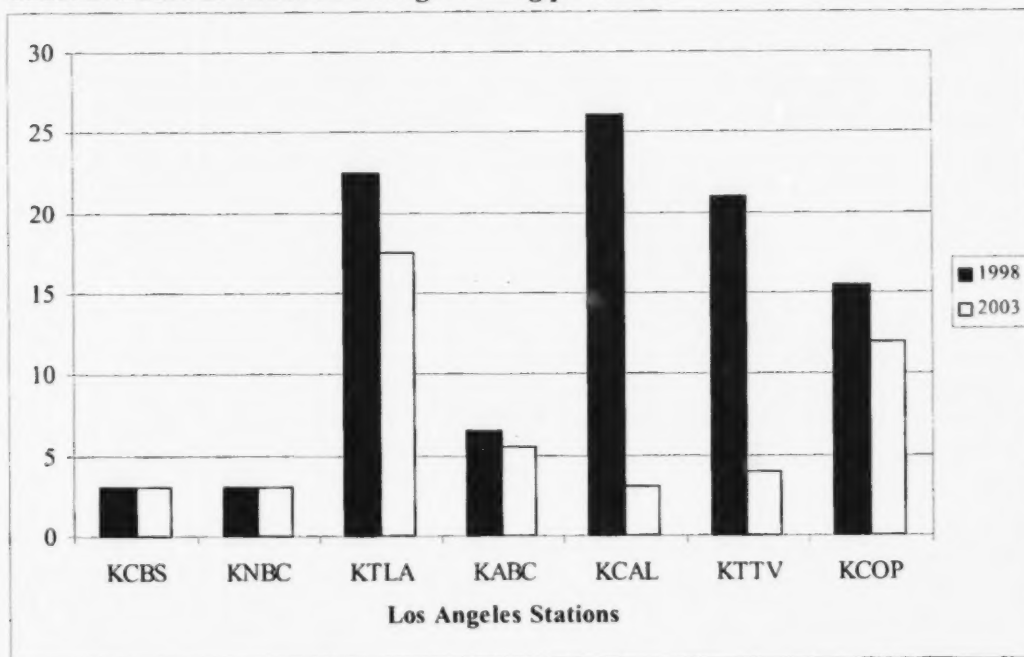
⁵ For both years, the total number of series per week is one less than the combined totals from each station. This is due to the fact that in 1998 *101 Dalmatians* was broadcast on both KABC and KCAL and in 2003 *Recess* was broadcast on both KABC and KCOP. Although these shows were each counted as part of the series totals for each of the stations, they were not counted twice toward the number of series per week for each year.

- KCAL decreased its hours for children's programming by 89%, from 26 hours per week in 1998 to 3 hours per week in 2003, the minimum required by FCC guidelines.
- KTTV decreased its hours for children's programming by 81%, from 21 hours per week in 1998 to 4 hours per week in 2003.

KCOP, KTLA and KABC each had notable, though not significant, decreases in their hours of children's programming.

- KCOP decreased children's programming time by 3.5 hours per week (23%), from 15.5 hours to 12 hours.
- KTLA decreased children's programming time by 5 hours per week (22%), from 22.5 hours to 17.5 hours.
- KABC decreased children's programming time by one hour per week (15%), from 6.5 hours to 5.5 hours.
- KCBS and KNBC showed no decreases in 1998 and 2003 because both stations broadcast the minimum amount of programming hours required by FCC guidelines.

Chart 2. Hours of Children's Programming per Week



III. Hours of Availability of Children's Programs

Because some children's programs are broadcast on the same day and in the same time slot each week, it is necessary to examine how many total program hours (the number of hours each week that children's programs can be found on the air) are available to young viewers. In addition, it is important to note how many stations are providing children with programming at any given hour. This provides a more detailed picture of program availability for young viewers.

Since 1998, the number of program hours per week has decreased by 31%. Over the course of one week in 1998, children's programming could be found on commercial broadcast television in Los Angeles across 47 different potential viewing hours. Five years later, children's programming had decreased to 32.5 program hours per week. Broken down by day, young viewers lost the following weekly total:

- 3 hours when children's programming is available on Saturdays;
- 4 hours when children's programming is available on Sundays;
- 7.5 hours when children's programming is available on weekdays (1.5 hours Monday through Friday).

The number of stations broadcasting children's programming at any given hour has decreased as well, reducing the diversity of age-appropriate program choices available to children.

- In 1998, a total of four stations—three of which were independently-owned—aired children's programs during weekdays; two on weekday mornings (KCAL and KCOP); and three on weekday afternoons (KTLA, KCAL and KCOP).
- In 2003, one station broadcast children's programs on weekday mornings (KCOP) and one broadcast on weekday afternoons (KTLA).

IV. Repurposing of Children's Programming

Repurposing of programming occurs when a series airs on more than one channel or network. In most cases, the second channel is a cable channel owned by the same corporation as the commercial broadcast station. Repurposing allows large media corporations to increase revenue by distributing the same programming across multiple outlets, thereby reducing their programming costs. Repurposing is of interest to children's advocates because, even though some of the repurposed programs are of high quality, it still reduces the number of unique programs across the children's television landscape.

Children's programs were almost four times more likely to be repurposed in 2003 than in 1998. In 1998, 11% of children's programs were broadcast on more than one channel. By 2003, that number had increased to 43%, indicating a dramatic reduction in the diversity of available children's shows. This finding is particularly significant when combined with the decreases in the total number of children's series and the total hours of programming for children.

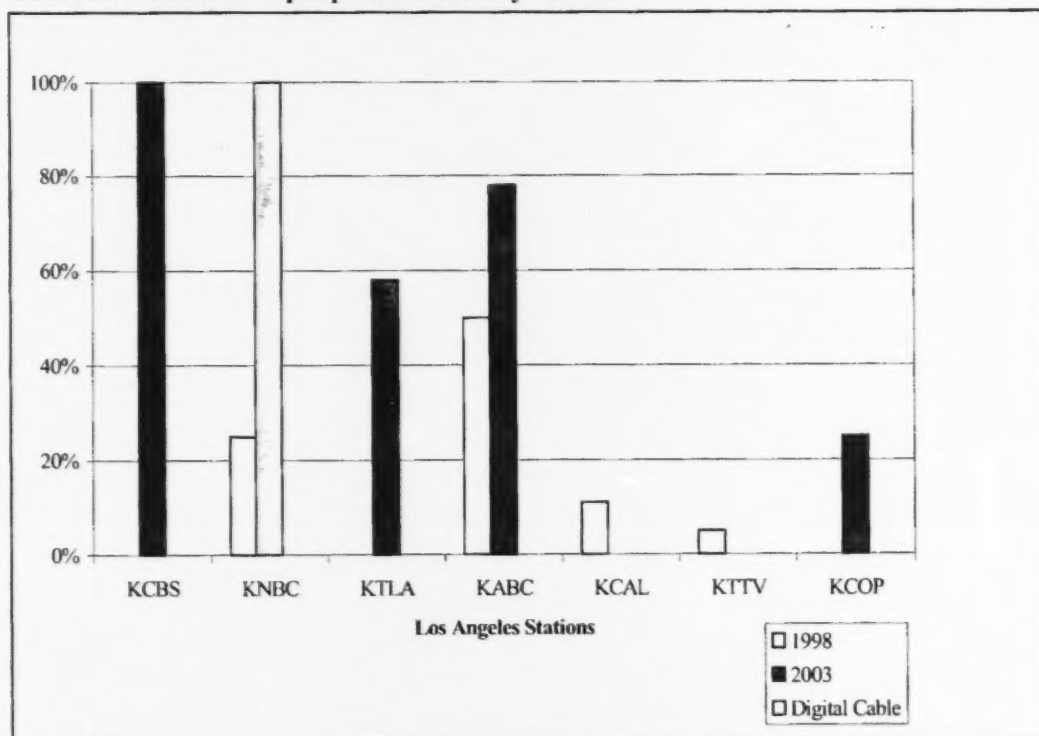
Most repurposing occurred between outlets that were owned by the same media companies.⁶ In 2003:

- 100% of KCBS programming was also broadcast on Viacom-owned Nickelodeon.
- 78% of KABC children's programming was also broadcast on one or more of the cable channels owned by The Walt Disney Company.

⁶ Viacom and Disney are currently the only two owners that also own children's cable channels. News Corp. no longer owns a children's cable property since it sold Fox Family Channel to Disney. It is therefore not surprising that there is little repurposing on its duopoly stations.

- 58% of the children's series broadcast on KTLA, a WB affiliate, were also broadcast on AOL-Time Warner's Cartoon Network.
- 100% of KNBC programming was also broadcast on Discovery Kids digital cable channel, though it was not counted as repurposing due to the current limited availability of digital cable.

Chart 3. Percent of Repurposed Shows by Station



V. Discussion

When the FCC announced its review of current media ownership regulations, it requested empirical evidence to help inform the rulemaking. Since none of the FCC-commissioned studies considered the consequences of consolidation for children, there was a critical need for such research. Children Now conducted this study to provide empirical evidence that would enable the Commission to consider the consequences its decisions will have on the child audience before proceeding with its rulemaking.

The results of this study are clear: Large media conglomerates are not acting in the best interests of children. They are broadcasting fewer children's series over fewer hours and are repurposing programs from their cable properties, rather than creating unique shows for their commercial broadcast stations. The greatest decreases in children's programming occurred on duopoly stations. The program variety children once had on weekdays has disappeared and has been replaced with adult-oriented shows such as *Divorce Court*, *Cops* and *Ricki Lake*. Overall, the results of this study leave little doubt that media consolidation diminishes the availability and diversity of children's television programming.

This study looked exclusively at children's programming in Los Angeles, but children's programming options in Los Angeles are not unique to that market. In media markets across the country, most major commercial broadcast stations are either network owned-and-operated or network-affiliated, so programming options in other cities are likely to be similar to those in Los Angeles. In addition, the television ownership situation is not exclusive to Los Angeles, because media consolidation is also taking place in other markets across the country. If the Commission decides to relax existing media ownership rules, the extent of consolidation will be even more dramatic and the programming changes that occur could have even stronger implications for children across the nation.

This study examines only the early stages of media consolidation. What will happen to children's programming in the future if the Commission continues to relax or eliminate existing rules? This study demonstrates that, after being purchased by large media conglomerates, some independent stations that once served the child audience with a large and diverse array of children's programs, instead offer a minimum of children's programming. Further consolidation may lead to a future where stations broadcast only the minimum requirement of three hours of children's educational programming per week, networks own all of their children's programming, source diversity is virtually nonexistent and companies repurpose their children's programs across all their jointly-owned stations. Although this scenario will be profitable for large media conglomerates, our nation's children will ultimately pay the price.

It is imperative that this hypothetical future does not become a reality. In order to protect children's needs, the Commission should slow down its impending rulemaking and consider the impact of its proposed rule changes on the youngest consumers of television. This research provides compelling evidence that the concentration of large media conglomerates in one market can have a negative impact on the availability and diversity of children's programming. Children Now is concerned that further concentration will have even greater negative effects on children's programming, particularly if the Commission lifts the 35% ownership cap and allows duopolies in local markets. That toll will be particularly harsh for those children in families that do not have access to cable or satellite television.

Children Now urges the Commission to retain the current media ownership rules to ensure diversity of programming for the child audience. Yet, recognizing that the Commission plans to announce revisions to the ownership rules on June 2, 2003, Children Now asks that special accommodations be made for children's television. These accommodations include:

1) Prohibiting duopoly stations from sharing children's programming

Children Now is concerned that the elimination of the Local Television Ownership Rule will result in repurposed programming across stations in a community. Should the Commission modify or eliminate this rule, one owner who controls several stations in the same market could potentially repurpose the same programming across these stations. Not only would this diminish the diversity of programming available to children, but such repurposing also could be used to satisfy the Children's Television Act educational television requirements, drastically reducing the already limited number of available educational programs. Thus, the Commission should prohibit sharing of children's programming across stations owned by the same company in a local market.

2) Requiring a minimum amount of original programming

As this study shows, repurposing is becoming increasingly common and is resulting in diminished program diversity for the child audience. If the Commission does not prohibit the sharing of children's programming between duopoly stations, it should require a minimum amount of original programming. The Commission should consider models from other countries, such as Australia, which prioritize children's interests by instituting such a requirement and adopt a similar rule for children's television in the United States.

3) Conducting further research on the impact of media consolidation on children

Due to the brief period provided for comments prior to the Commission's rulemaking, there has not been adequate time to conduct comprehensive research on the extent of the impact of media consolidation on children's programming.

After surveying the children's media landscape, Children Now believes there has been a decline in the number of producers of children's programs, which threatens not only the diversity of viewpoints and ideas but also the opportunities for innovation, both essential to the creation of high quality programs. Children Now also is concerned that there has been an increase in the amount of violent, action-oriented programs, which may not only result in less genre diversity but also expose children to large amounts of program content that could be harmful to their development. Children Now urges the FCC to commission further research to explore how media consolidation may affect the quality of children's programming.

This research demonstrates that changes to current ownership policies will have a serious impact on the availability and diversity of children's programming. Children Now urges the Commission to consider the findings of this study and to put the needs of our nation's children above the financial interests of media companies in order to ensure that broadcasters meet their public interest obligations to children.

Methodology

This study examined the children's programming schedules for the seven primary commercial broadcast stations in Los Angeles (KCBS, KNBC, KTLA, KABC, KCAL, KTTV, and KCOP) for the third week in February 1998 and 2003. Children's programs were defined as shows meeting at least one of the following criteria:

- They were listed in *TV Guide* with a TV-Y or TV-Y7 rating;
- They were listed in *TV Guide* with a descriptor such as "children," "cartoon," "teenager," or "educational;"
- They were listed in a station's Federal Communications Commission Children's Television Programming Report.

Each program episode that met the selection criteria was included in the analysis.

Repurposing information was collected by checking the Los Angeles edition of *TV Guide* for the appropriate week. Programs broadcast on more than one channel widely available in the Los Angeles market during the sample week were determined to be repurposed.

All data were collected and coded by Christina Romano Glaubke, MA. To ensure reliability, at least 50% of all program information was coded by two other trained coders. The percent of agreement between coders was calculated. The variables of program, genre and repurposing included in this analysis received a level of agreement of at least 93%.

All data were analyzed by Katharine E. Heintz-Knowles, Ph.D. to determine whether changes in the number of children's programs, hours of children's programming, available program hours and amount of repurposing were significant. Using chi-square tests, data were analyzed on a macro level to detect significant changes in the Los Angeles market as a whole and on a micro level to detect significant changes within each individual station. All data reported in this study are statistically significant at $p < .05$ level unless indicated otherwise.

Acknowledgements and Credits

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Report Written By: Christina Romano Glaubke, MA and Patti Miller, MA

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Children Now is a research and action organization dedicated to assuring that children grow up in economically secure families, where parents can go to work confident that their children are supported by quality health coverage, a good early education, safe, productive things to do after school and a positive media environment. Children Now designs its strategies to improve children's lives while at the same time helps America build a sustained commitment to putting children first. Recognized for its expertise in media as a tool for social change, Children Now is an independent, nonpartisan organization.

The Children & the Media Program works to improve the quality of news and entertainment media both for children and about children's issues, paying particular attention to media images of race, class and gender. We seek to accomplish our goals through media industry outreach, independent research and public policy development.

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Appendix: Children's Programs in Los Angeles

Station	February 14-20, 1998	February 15-21, 2003
KCBS	<i>Beakman's World</i> <i>CBS Storybreak</i> <i>New Ghostwriter Mysteries</i> <i>Sports Ill for Kids Show, The</i> <i>Weird Al Show, The</i> <i>Wheel of Fortune 2000</i>	<i>Blue's Clues</i> <i>Chalk Zone</i> <i>Dora the Explorer</i> <i>Hey Arnold!</i> <i>Rugrats</i> <i>Wild Thornberrys</i>
KNBC	<i>City Guys</i> <i>Hang Time</i> <i>NBA Inside Stuff</i> <i>Saved by the Bell: New Class</i>	<i>Crocodile Hunter's Croc Files</i> <i>Endurance</i> <i>Operation Junkyard</i> <i>Prehistoric Planet</i> <i>Scout's Safari</i> <i>Strange Days @ Blake Holsey High</i>
KTLA	<i>All Dogs Go to Heaven</i> <i>Animaniacs</i> <i>Beast Wars</i> <i>Bugs n Daffy</i> <i>California Dreams</i> <i>Channel Umptee-3</i> <i>Men in Black</i> <i>New Bat/Superman Adventures</i> <i>New Captain Planet</i> <i>Pinky & the Brain</i> <i>Saved by the Bell</i> <i>Saved by the Bell: The College Years</i> <i>Superman</i> <i>Sylvester & Tweety Mysteries</i>	<i>Baby Looney Tunes</i> <i>City Guys</i> <i>Jackie Chan Adventures</i> <i>Mummy: Secrets of the Madjai</i> <i>Ozzy & Drix</i> <i>Pokemon</i> <i>Rescue Heroes</i> <i>Scooby Doo</i> <i>Static Shock</i> <i>What's New Scooby Doo?</i> <i>Wild America</i> <i>Yu-Gi-Oh!</i>
KABC	<i>101 Dalmatians</i> <i>Bugs Bunny</i> <i>Jack Hanna's Animal Adventures</i> <i>Jungle Cubs</i> <i>New Adventures of Winnie Pooh</i> <i>Nick News</i> <i>One Saturday Morning: Doug</i> <i>One Saturday Morning: Pepper Ann</i> <i>One Saturday Morning: Recess</i> <i>One Saturday Morning: Schoolhouse</i> <i>Rock, Great Minds... Think For</i> <i>Themselves, What's Up With That?</i> <i>Science Court</i> <i>Wild About Animals</i>	<i>American Athlete, The</i> <i>Fillmore!</i> <i>Kim Possible</i> <i>Lizzie McGuire</i> <i>NBA Inside Stuff</i> <i>Power Rangers Ninja Storm</i> <i>Proud Family, The</i> <i>Recess</i> <i>Teamo Supremo</i>
KCAL	<i>Belle's Bookshop: Sing Me a Story</i> <i>Bill Nye the Science Guy</i> <i>Captain Simian</i>	<i>Awesome Adventures</i> <i>Critter Gitters</i> <i>Jack Hanna's Animal Adventures</i>

KCAL, continued	<i>Click</i> <i>Dragon Ball Z</i> <i>Duck Tales</i> <i>Enchanted Tales</i> <i>Field Trip</i> <i>Mighty Ducks</i> <i>Mr. Men</i> <i>Mummies Alive</i> <i>Peer Pressure</i> <i>Popular Mechanics for Kids</i> <i>Quack Pack</i> <i>The Mask</i> <i>Wacky World of Tex Avery</i> <i>X-Men</i>	<i>Wild About Animals</i>
KTTV	<i>BeetleBorgs Metallix</i> <i>Bobby's World</i> <i>C-Bear & Jamal</i> <i>Casper</i> <i>Garfield</i> <i>Goosebumps</i> <i>Life with Louie</i> <i>Mowgli: the New Adventures of the Jungle Book</i> <i>Ned's Newt</i> <i>New Voltron</i> <i>Oscar's Orchestra</i> <i>Power Rangers In Space</i> <i>Power Rangers Turbo</i> <i>Sam & Max</i> <i>Silver Surfer</i> <i>Space Goofs</i> <i>Spider-Man</i> <i>Student Bodies</i> <i>Teenage Mutant Ninja Turtles:</i> <i>Toonsylvania</i> <i>Ultimate Goosebumps</i>	<i>Kirby Right Back at Ya!</i> <i>Petshop with Marc Morrone, The Scope</i> <i>Sherlock Holmes in the 22nd Century</i> <i>Stargate Infinity</i> <i>Teenage Mutant Ninja Turtles</i> <i>Wild Moments</i>
KCOP	<i>Adventures of Oliver Twist</i> <i>Algo's Factory</i> <i>Bananas in Pajamas & the Crayon Box</i> <i>Breaker High</i> <i>Extreme Dinosaurs</i> <i>Extreme Ghostbusters</i> <i>Fantastic Four</i> <i>Incredible Hulk</i> <i>Iron Man</i> <i>Jumanji</i>	<i>Buzz Lightyear of Star Command</i> <i>Digimon: Digital Monsters</i> <i>Legend of Tarzan</i> <i>Recess</i>

KCOP, continued	<i>New Captain Kangaroo</i> <i>Sweet Valley High</i> <i>Van-Pires</i> <i>Zorro</i>	
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